

Appendix A

Designated Positions	Disclosure Categories
Board	
Deputy to Board Member	AH 1
Administrative Assistant to Board Member	AH 1
Assistant to Board Member	AH 1
CEA	AH 1
<u>District Director</u>	1
<u>Community Affairs Deputy</u>	1
Administrative Assistant	1-8 1
Staff Services Manager	1-8 1
Tax Counsel	1-6 1
<u>Executive Secretary</u>	1
Tax Consultant Expert	1-2 -6
Tax Services Specialist	1-2 -6
Assistant Tax Services Specialist	1-2 -6
Associate Governmental Program Analyst	1-2 -6
<u>Associate Tax Auditor</u>	2-6
Business Taxes Representative	1-2 -6
Business Taxes Specialist II	1-2 -6
Information Officer <u>I or II</u>	1-2 -6
<u>Staff Service Analyst</u>	7
Executive <u>Office</u>	
Executive Director	AH 1
Administrative Assistant	AH 1
<u>CEA (Communications Office)</u>	AH
Board Proceedings Division	
CEA	AH 1
Staff Services Manager	AH 1
Associate Governmental Program Analyst	
(LAN Workgroup Manager)	1-6, 8
Associate Governmental Program Analyst	1-2 -6
Customer and Taxpayer Services Division	
CEA	AH
Staff Services Manager	1-9
Business Taxes Compliance Specialist	1-6
Assistant Tax Services Specialist	1-6
Associate Governmental Program Analyst	1-6
Associate Information Systems Analyst	8
Staff Services Manager (Forms and Publications Section)	7, 9

Assistant Tax Services Specialist (Forms and Publications Section)	7, 8
Associate Governmental Program Analyst (Forms and Publications Section)	7, 8
 <u>Legislative and Research Division</u>	
Assistant Chief Counsel	AH1
CEA	AH1
Staff Services Manager	42-6, 8, 9
Senior Specialist Property Appraiser	1-6
Executive Assistant	1
Executive Secretary	1
Business Taxes Specialist	42-6
Associate Governmental Program Analyst (System or LAN Administrator)	42-6, 8
Operations Research Specialist	42-4, 6, 8
Research Manager	2-4, 8, 9
Research Program Specialist	42-4, 8
Research Analyst	42-4, 8
 <u>Taxpayers' Rights and Equal Employment Opportunity Division</u>	
Taxpayers' Rights Advocate	1
Staff Services Manager III (TRA)	1
Tax Counsel (TRA)	1
Business Taxes Administrator II (TRA)	2, 5, 7
Business Taxes Specialist I or II (TRA)	2, 5
Associate Governmental Program Analyst (TRA)	2, 5
Management Services Technician (TRA)	2, 5
Tax Technician I (TRA)	2, 5
Senior Specialist Property Appraiser (TRA)	3, 4
Assistant Property Appraiser (TRA)	3, 4
Staff Services Manager (EEOO)	7
Associate Governmental Program Analyst (EEOO)	7
 <u>Internal Security and Audit Division</u>	
CEA	1
Business Taxes Administrator	1
Business Taxes Specialist	1
Staff Services Manager	7
Associate Governmental Program Analyst	7
Staff Information Systems Analyst	7
Associate Information Systems Analyst	7
 <u>Technology Services Division/Department</u>	
Chief Information Officer	1
Chief Technology Officer	1

CEA	AH1
Data Processing Manager IV	AH1
Executive Assistant	1
Business Taxes Administrator	1, 2, 7-9
Business Taxes Compliance Supervisor	1, 2, 7-9
Data Processing Manager	7-9
Staff Services Manager	7-9
Senior Programmer Analyst (Supervisor)	8, 9
Systems Software Specialist	8
Associate Systems Software Specialist	8
Senior Information Systems Analyst	8
Staff Information Systems Analyst	8
Associate Information Systems Analyst	8
Senior Programmer Analyst	8
Staff Programmer Analyst	8
Associate Programmer Analyst	8
Associate Governmental Program Analyst	8
 Taxpayers' Rights and Equal Employment Opportunity Division	
CEA	All
Business Taxes Specialist (TRA)	1-4
Associate Property Appraiser (TRA)	1-4
Staff Services Manager (EEOO)	7, 9
Associate Governmental Program Analyst (EEOO)	7, 9
 Administration Department	
Deputy Director	1
Administrative Assistant	1
CEA	All
Associate Management Analyst	9
Data Processing Manager (Information Security Office)	8, 9
Senior Information Systems Analyst	8
Training Officer (Training Office)	9
Associate Governmental Program Analyst (Training Office)	9
 Administrative Support Division	
CEA	AH1
Staff Services Manager	7-10
Associate Business Management Analyst	7-9
Associate Governmental Program Analyst	7-9
Staff Information Systems Analyst	8
Associate Information Systems Analyst	8
Telecommunications Systems Analyst	10
Office Services Manager (Supervisor, Cashier Unit)	7
Business Services Officer (Supervisor)	9

<u>Printing Trades Supervisor</u>	9
<u>Warehouse Manager</u>	9
<u>Office Services Supervisor</u>	9
<u>Mailing Machine Supervisor</u>	9

Personnel Management Human Resources Division

<u>CEA</u>	7-91
<u>Administrative Assistant</u>	1
<u>Staff Services Manager</u>	7-9
<u>Associate Governmental Program Analyst</u>	7-9
<u>Associate Personnel Analyst</u>	7-9
<u>Labor Relations Specialist</u>	7-9
<u>Personnel Supervisor</u>	9

Financial Management Division

<u>CEA</u>	Alt 1
<u>Staff Services Manager</u>	7-9
<u>Accounting Administrator</u>	7-9
<u>Associate Accounting Analyst</u>	7-9
<u>Senior Administrative Analyst</u>	7
<u>Associate Administrative Analyst</u>	7-9
<u>Associate Budget Analyst</u>	7-9
<u>Senior Accounting Officer</u>	7-9
<u>Associate Governmental Program Analyst</u>	7-9
<u>Office Services Manager</u>	7
<u>Staff Information Systems Analyst (Specialist)</u>	8
<u>Information Systems Technician Supervisor</u>	8, 9
<u>Associate Information Systems Analyst</u>	8
<u>Systems Software Specialist</u>	8
<u>Office Services Supervisor</u>	9
<u>Key Data Supervisor</u>	9

Policy, Planning and Evaluation Division

<u>Staff Services Manager III</u>	1-4, 7-9
<u>Staff Services Manager I or II</u>	7-9
<u>Associate Management Analyst</u>	7-9
<u>Associate Business Management Analyst</u>	7-9
<u>Associate Governmental Program Analyst</u>	7-9
<u>Staff Information Systems Analyst</u>	8

External Affairs Department

<u>Deputy Director</u>	1
<u>Staff Services Manager</u>	1
<u>Information Officer</u>	1
<u>Associate Governmental Program Analyst</u>	1
<u>Staff Information Systems Analyst</u>	7
<u>Associate Management Analyst</u>	7

Outreach Services Division

<u>Staff Services Manager</u>	<u>1</u>
<u>Assistant Tax Services Specialist</u>	<u>2-6</u>
<u>Associate Governmental Program Analyst</u>	<u>2-6</u>
<u>Business Taxes Specialist</u>	<u>7</u>

Customer Service and Publishing Division

<u>Staff Services Manager</u>	<u>1</u>
<u>Associate Governmental Program Analyst</u>	<u>2-6</u>
<u>Business Taxes Compliance Specialist</u>	<u>2-6</u>
<u>Tax Services Specialist</u>	<u>7</u>
<u>Systems Software Specialist</u>	<u>8</u>
<u>Supervising Tax Technician</u>	<u>9</u>

Web Services Division

<u>Senior Information Systems Analyst (Supervisor)</u>	<u>7</u>
<u>Associate Programmer Analyst</u>	<u>8</u>
<u>Staff Programmer Analyst</u>	<u>8</u>
<u>Associate Information Systems Analyst</u>	<u>8</u>
<u>Assistant Information Systems Analyst</u>	<u>8</u>

Legal Department

<u>Chief Counsel</u>	<u>1</u>
<u>CEA</u>	<u>All</u>
<u>Assistant Chief Counsel</u>	<u>All</u>
<u>Tax Counsel</u>	<u>1-6</u>
<u>Executive Assistant</u>	<u>1</u>
<u>Supervising Tax Auditor (Settlement Division)</u>	<u>1, 2, 9</u>
<u>Supervising Tax Auditor (Appeals Division)</u>	<u>2</u>
<u>Associate Governmental Program Analyst</u>	<u>7</u>
<u>Administrative Assistant</u>	<u>7-9</u>
<u>Business Taxes Administrator</u>	<u>7</u>
<u>Librarian</u>	<u>7, 8</u>
<u>Staff Information Systems Analyst</u>	<u>8</u>
<u>Associate Information Systems Analyst</u>	<u>8</u>
<u>Business Taxes Specialist II or III</u>	<u>1, 2</u>
<u>Business Taxes Specialist I</u>	<u>1, 2 *</u>
<u>Business Taxes Compliance Supervisor (Offers in Compromise)</u>	<u>1, 2</u>
<u>Business Taxes Compliance Specialist (Offers in Compromise)</u>	<u>1, 2</u>
<u>Business Taxes Specialist (Offers in Compromise)</u>	<u>1, 2</u>

Internal Security and Audit Division

<u>CEA</u>	<u>All</u>
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Business Taxes Administrator	All
Business Taxes Specialist	All
Associate Tax Auditor	All
Associate Governmental Program Analyst	7-9
Systems Software Specialist	8
Staff Information Systems Analyst	8
Associate Information Systems Analyst	8
Assistant Information Systems Analyst	8

Investigations and Special Operations Division

CEA	All
<u>Administrative Assistant</u>	1
Business Taxes Administrator	1, 2, 7-9
Business Taxes Compliance Supervisor	2, 7
Associate Governmental Program Analyst	2, 7
Business Taxes Specialist	1, 2
Business Taxes Compliance Specialist	1, 2
Supervising Tax Auditor	1, 2, 9
Associate Tax Auditor	1, 2
Senior Information Systems Analyst	8
Staff Information Systems Analyst	8

Property and Special Taxes Department

<u>Deputy Director</u>	1
CEA	All
<u>Executive Assistant</u>	1
Administrative Assistant	1, 2, 6-9
Staff Services Manager	7-9
Business Taxes Administrator	2, 7
Business Taxes Compliance Supervisor	2, 9
Supervising Tax Auditor	2, 9
Business Taxes Compliance Specialist	2
Business Taxes Specialist II or III	2
Business Taxes Specialist I	2*
Associate Tax Auditor	2*
Associate Governmental Program Analyst	3, 7-9
Staff Information Systems Analyst	8

Assessment Policy and Standards Division

CEA	3, 7-9
Principal Property Appraiser	3, 7-9
Senior Specialist Property Appraiser	3
Senior Specialist Property Auditor Appraiser	3
Supervising Property Appraiser	3, 7-9
Associate Property Appraiser	3
Associate Property Auditor Appraiser	3

<u>Research Analyst II (GIS)</u>	<u>3</u>
 <u>County-Assessed Properties Tax Division</u>	
CEA	3, 4, 7-91
Principal Property Appraiser	3, 7-9
Senior Petroleum and Mining Appraisal Engineer	3
Supervising Property Appraiser (Assessment Practices Surveys Section)	3, 7-9
Senior Specialist Property Appraiser (Assessment Practices Surveys Section)	3
Senior Specialist Property Auditor Appraiser (Assessment Practices Surveys Section)	3
<u>Senior Petroleum and Mining Appraisal Engineer</u>	<u>3</u>
Associate Property Appraiser (Assessment Practices Surveys Section)	3
Associate Property Auditor Appraiser (Assessment Practices Surveys Section)	3
<u>Assistant Property Appraiser</u>	<u>3</u>
<u>Assistant Property Auditor Appraiser</u>	<u>3</u>
<u>Business Taxes Specialist II</u>	<u>3</u>
<u>Staff Information Systems Analyst</u>	<u>8</u>
<u>Staff Services Analyst</u>	<u>9</u>
 <u>Timber Tax Section</u>	
<u>Principal Property Appraiser</u>	<u>4, 9</u>
Supervising Property Appraiser (Timber Tax Section)	4, 7-9
Senior Specialist Property Auditor Appraiser (Timber Tax Section)	4
Associate Property Auditor Appraiser (Timber Tax Section)	4
Senior Forest Property Appraiser	4
Associate Forest Property Appraiser	4
<u>Assistant Property Auditor Appraiser</u>	<u>4</u>
 <u>Valuation State-Assessed Properties Division</u>	
CEA	3, 7-91
Principal Property Appraiser	3, 7-9
<u>Supervising Property Appraiser</u>	<u>3, 7</u>
<u>Research Manager</u>	<u>3, 7</u>
Senior Specialist Property Appraiser	3
Senior Specialist Property Auditor Appraiser	3
Supervising Property Appraiser	3, 7-9
<u>Business Taxes Specialist II</u>	<u>3</u>
Associate Property Appraiser	3
Associate Property Auditor Appraiser Auditor Appraiser	3
<u>Assistant Property Appraiser</u>	<u>3</u>
<u>Assistant Property Auditor Appraiser</u>	<u>3</u>

Research Analyst	3
Staff Services Analyst	9

Special Taxes and Fees Division

CEA	1
Business Taxes Administrator	2, 6, 7
Supervising Tax Auditor	2, 6, 7
Business Taxes Compliance Supervisor	2, 6, 7
Staff Information Systems Analyst	2, 6, 8
Associate Governmental Program Analyst	2, 6
Business Taxes Compliance Specialist	2, 6
Business Taxes Specialist II or III	2, 6
Business Taxes Specialist I	2, 6*
Associate Tax Auditor	2, 6*
Tax Auditor	2, 6*
Staff Services Analyst	7

Excise Taxes and Fees Division

CEA	1, 2, 7-9
Business Taxes Compliance Supervisor	1, 2, 6, 9
Business Taxes Compliance Specialist	1, 2, 6, 9
Supervising Tax Auditor	1, 2, 6, 9
Business Taxes Specialist II or III	1, 2, 6, 9
Business Taxes Specialist I	1, 2, 6*
Associate Tax Auditor	1, 2, 6*

Fuel Taxes Division

CEA	1, 2, 7-9
Business Taxes Administrator	1, 2, 7-9
Staff Services Manager	1, 2, 9
Business Taxes Compliance Supervisor	1, 2, 9
Business Taxes Compliance Specialist	1, 2, 9
Supervising Tax Auditor	1, 2, 9
Business Taxes Specialist II or III	1, 2, 9
Business Taxes Specialist I	1, 2*
Associate Tax Auditor	1, 2*

Sales and Use Tax Department

Deputy Director	1
CEA-3 or 4	AH1
CEA 2	1, 2, 7-9
Business Taxes Administrator	1, 2, 7-9
Administrative Assistant	1, 2, 7, 8
Business Taxes Compliance Supervisor (LAN Administrator)	1, 2, 8, 9
Business Taxes Compliance Supervisor	1, 2, 7, 9
Staff Services Manager	2, 7

Business Taxes Compliance Specialist	1,2,9
Supervising Tax Auditor	1,2, 7-9
<u>Supervising Tax Technician</u>	<u>2, 9</u>
Business Taxes Specialist II or III	1,2, 7-9
Business Taxes Specialist (Special Projects)	1, 2, 7-9
Business Taxes Specialist (Systems Coordinator)	1, 2, 8, 9
Business Taxes Specialist (Training Group)	1, 2, 9
Business Taxes Specialist (Computer Audit Specialist)	1, 2, 8
Business Taxes Specialist (Regulation Coordinator)	1, 2
Business Taxes Specialist (Revenue Opportunity)	1, 2
Business Taxes Specialist (Technical Advisor)	1, 2
Business Taxes Specialist (Project Coordinator)	1, 2
Business Taxes Specialist I	1,2 *
Associate Tax Auditor	1,2 *
<u>Tax Auditor</u>	<u>2</u> *
<u>Senior Information Systems Analyst</u>	<u>2, 8</u>
Staff Information Systems Analyst	1,2, 8
Associate Information Systems Analyst	1,2, 8
Associate Governmental Program Analyst	1,2, 8
Consultant	AH1 **

* Pursuant to 2 California Code of Regulations, section 18733, in lieu of filing Form 700, an employee in this disclosure category who was not assigned and did not participate in any property tax audits shall file Form 700-A.

** Consultants shall be included in the list of designated employees and shall disclose pursuant to the broadest disclosure category in the code subject to the following limitation: The Executive Director may determine in writing that a particular consultant is hired to perform a range of duties that is limited in scope and thus is not required to fully comply with the disclosure requirements in this section. Such written determination shall include a description of the consultant's duties and, based upon that description, a statement of the extent of disclosure requirements. The Executive Director's determination is a public record and shall be retained for public inspection in the same manner and location as this conflict of interest code.